BRASS Performance Budget Pilot

Training Manual

For

2004-06 Biennial Budget Request

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Program Mission

The first step in the process of completing the Performance Budget Request is to enter the Program Mission Statement. The Mission Statement data is located in the Program information table. To access the desired record follow the instruction listed below. All instructions assume BRASS is running on your desktop.
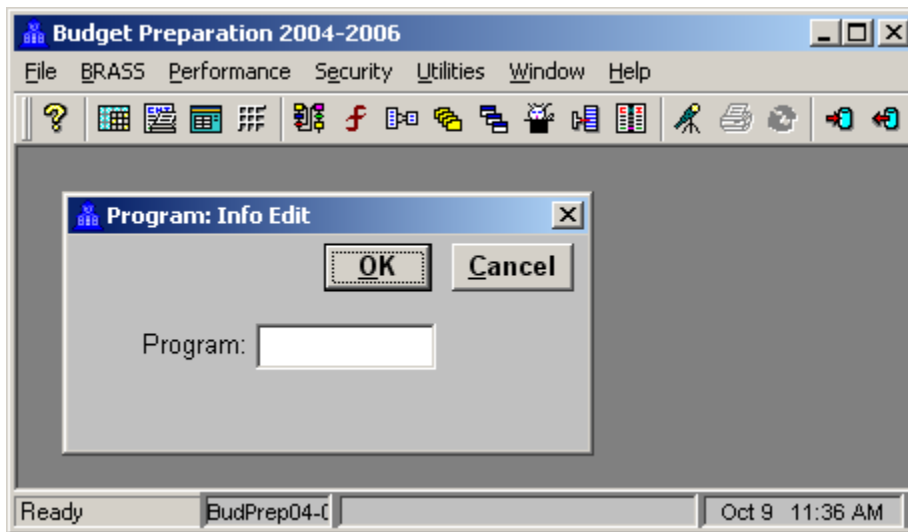
Step 1:

Select BRASS from the BRASS menu.

Step 2:

From the dropdown menu select Info Edit

Step 3:

From the pop-out menu select Program

The Program Info Edit window will appear. (Depicted Below)
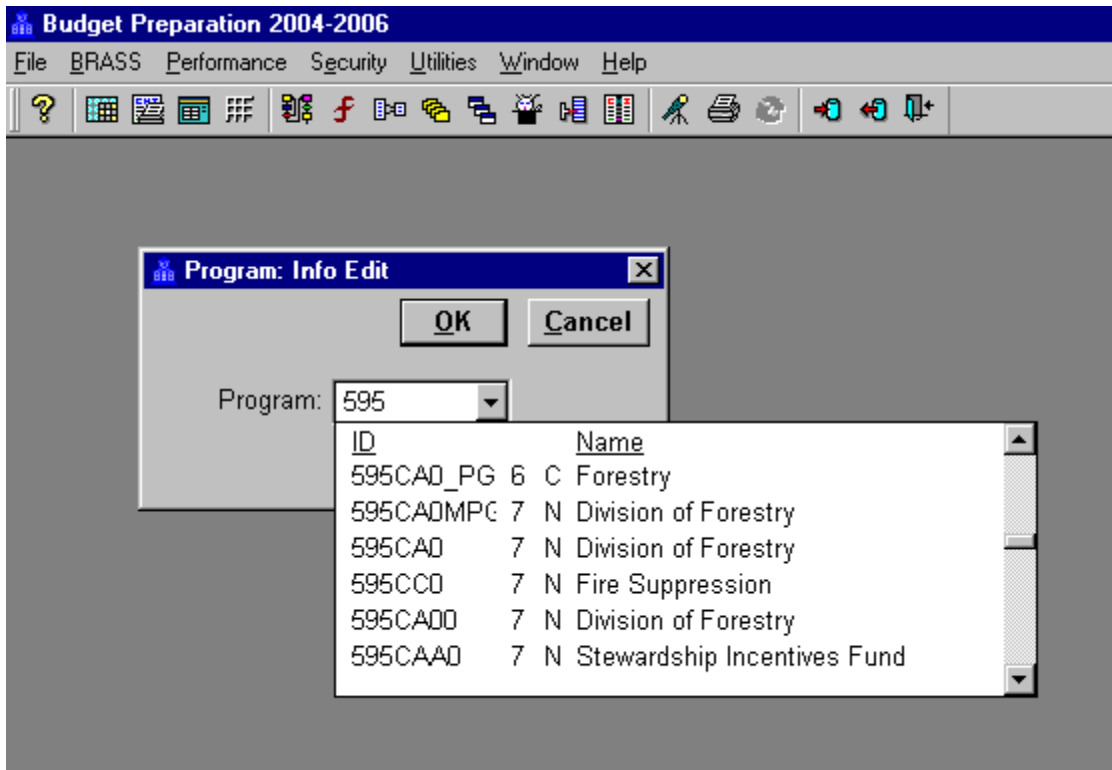

Step 4:

Activate the Program field by moving your mouse pointer into the white box and performing a single click. Once the field is active a dropdown menu arrow will appear.
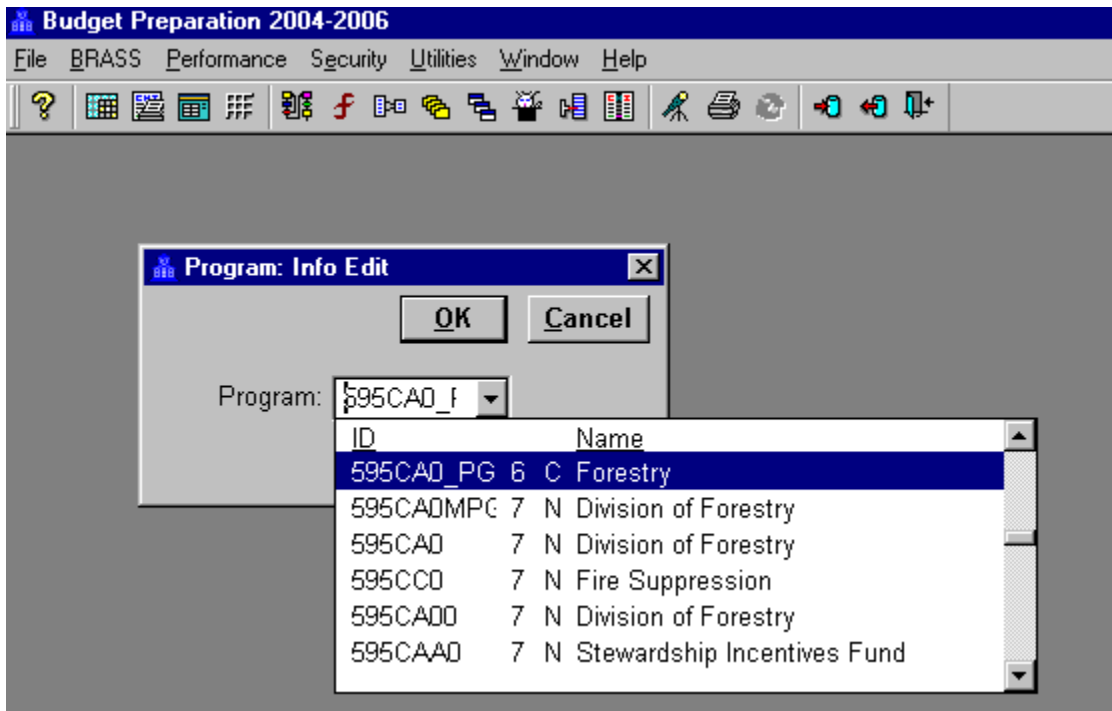
Step 5:

Single click the drop down menu arrow. The Info Edit records you have access to will appear. (Example on next page)
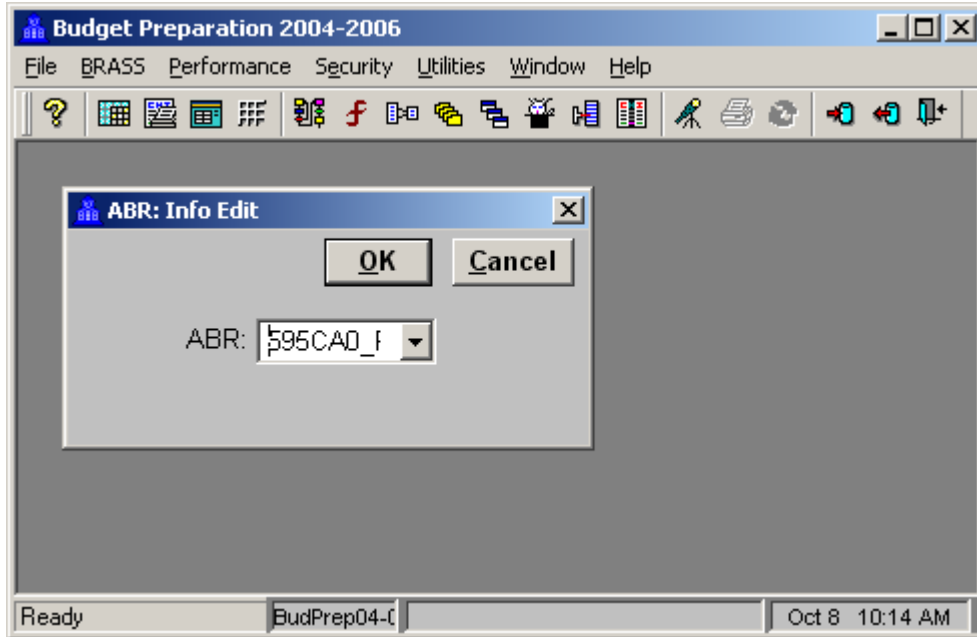
Step 6:

Select the appropriate program code as designated by the Agency + Program + _PG. (Example: 595CA0_PG)

At this point the Program Info Edit window should look like this:

Step 7:   Click the OK button in the Program Info Edit window. The Program Info Edit record for the code you selected will appear. (Example Below)

Step 8:

Select the Text tab from the Info Edit window. The text tab portion of the Info Edit window will appear. Notice that only the Text 1 box is active. This is where the Program Mission Statement should be entered.
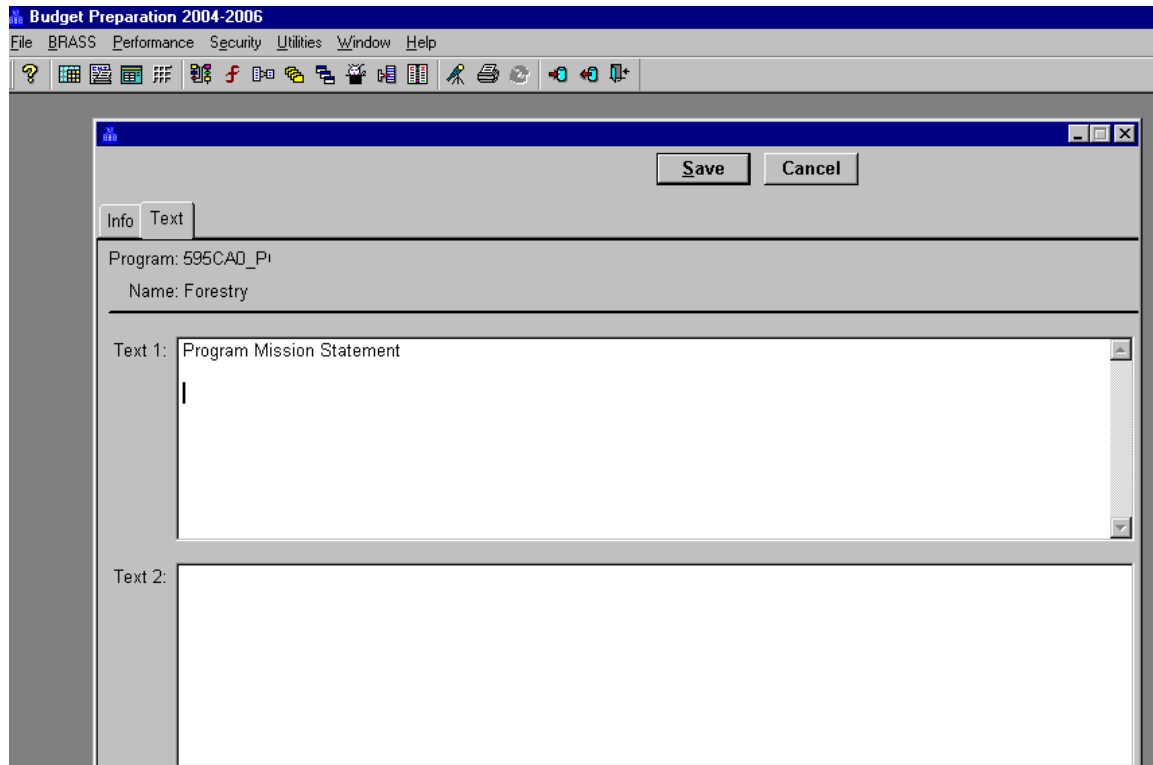
Step 9:

The Mission Statement may be updated by editing text box 1. To insert a blank line or carriage return you must use the Ctrl-Enter key combination.

Step 10:

Once you are satisfied with the Mission Statement click the Save button. The Info Edit window will close and return you to the main BRASS screen. Your Mission Statement has been saved in BRASS.

To locate each Objective, follow the same process as above, up to Step 6. Starting with Step 6 there are minor differences.
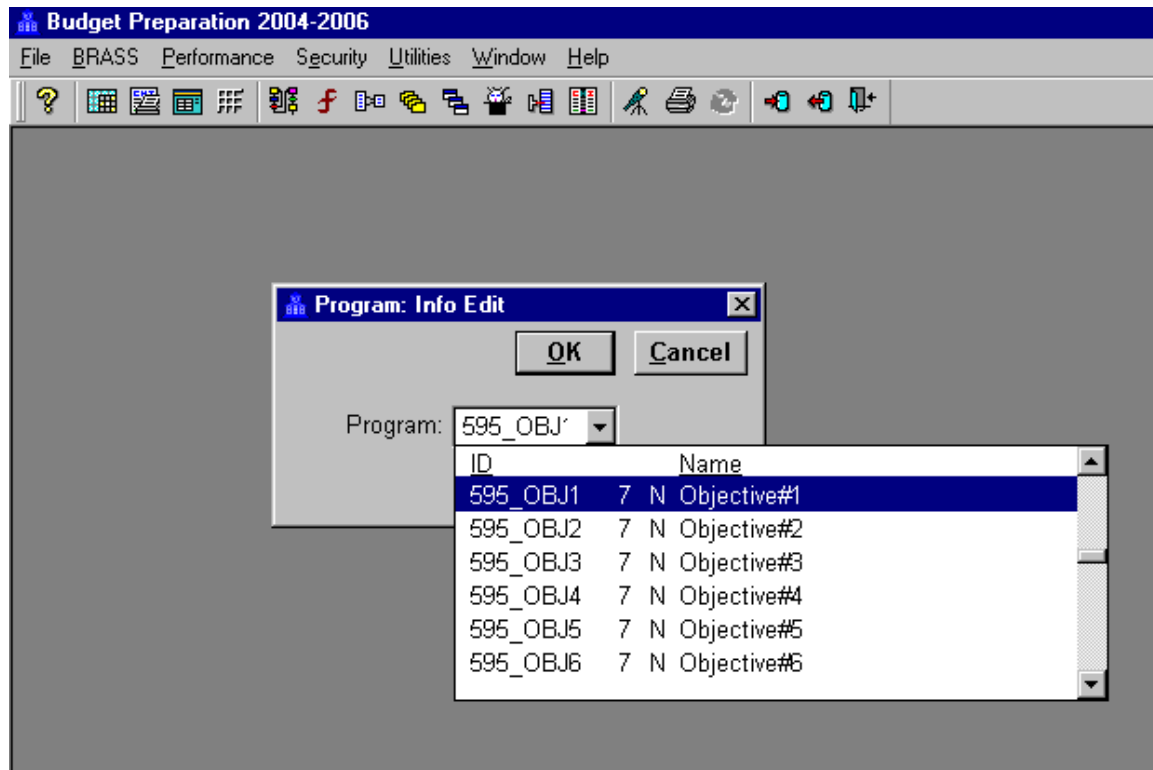
Step 6:

Select the appropriate Objective code. The objective code is comprised of your three-digit agency number, follow by an underline, followed by the Objective number. (Example: 595_OBJ1). Use your Budget Request report from 2002-2004 as an easy guide to know what Objective #1 is vs. Objective #2, etc. **The Objective codes are listed at the end of each Pilot Program's BRASS Program table codes.**

Step 7:

Click the OK button in the Program Info Edit window. The Program Info Edit record for the code you selected will appear. You should see the word Objective #1 (or #2, #3, etc.) in the name field.

Step 8:

Select the Text tab from the Info Edit Window. The text tab portion of the Info Edit window will appear. The Text 1 box is where you can review and update the Objective.

Step 9:

When updating the text box, remember to insert a blank line or to make a carriage return you must use the Ctrl-Enter key combination.

Step 10:

Once you are satisfied with the Objective, click the Save button. The Info Edit window will close and return you to the main BRASS screen. Your Objective has been saved in BRASS.

Performance Indicators

Each Objective has at least one Performance Indicator. Entering, modifying, and saving the definition of the Indicator is similar to the Mission Statement and the Objectives. Use your Budget Request report from 2002-2004 as an easy guide to know what each Performance Indicator code represents. To access the desired Indicator, follow the instructions listed below.
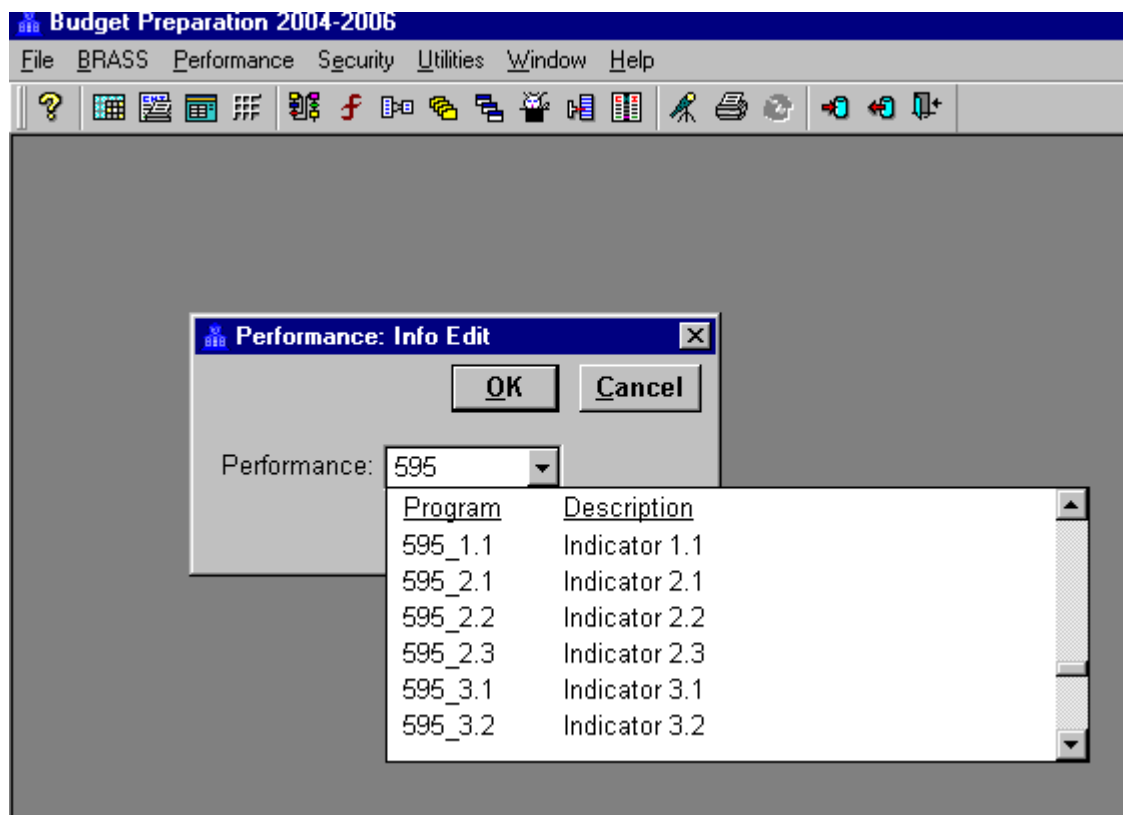
Step 1:

Select BRASS from the BRASS menu.

Step 2:

From the dropdown menu select Info Edit

Step 3:

From the pop-out menu select Performance

Step 4:

Activate the Performance field by moving your mouse pointer into the white box and performing a single click. Once the field is active a dropdown menu arrow will appear.

Step 5:
Single click the drop down menu arrow. The Info Edit records you have access to will appear.

Step 6:
Select the Indicator code for the desired Objective. The Indicator code is comprised of your three-digit agency number, follow by an underline, followed by the Indicator number. (Example: 595_1.1 stands for Objective 1, Indicator 1 just as 1.2 would stand for Objective 1, Indicator 2)

Step 7:
Click the OK button in the Performance Info Edit window. The Performance Info Edit record for the code you selected will appear. Notice that the design of the Performance Info Edit record is different than the other Info Edit records in BRASS. You will find 2 text boxes available for use. Text 1 is for a brief description of the indicator.

Step 8:

  Move your mouse pointer to the Text 1 box and single click. This will activate Text 1. **Use Text 1 for the description of the Performance Indicator**.

Step 9:

  Review the description of the Indicator in Text 1. It should be no longer than 60 characters.

Step 10:

  Move your mouse pointer to the Text 2 box and single click. This will activate Text 2. **Use Text 2 to add any notes or explanatory information to expand and clarify the Performance Indicator**.

Step 11:

  You may review and update the notes and explanatory information of the Performance Indicator located in Text 2.   Because of printing restrictions please limit your entry to five lines of text.

Once you have completed the Performance Info Edit record, click the Save button. The Info Edit window will close and return you to the main BRASS menu.
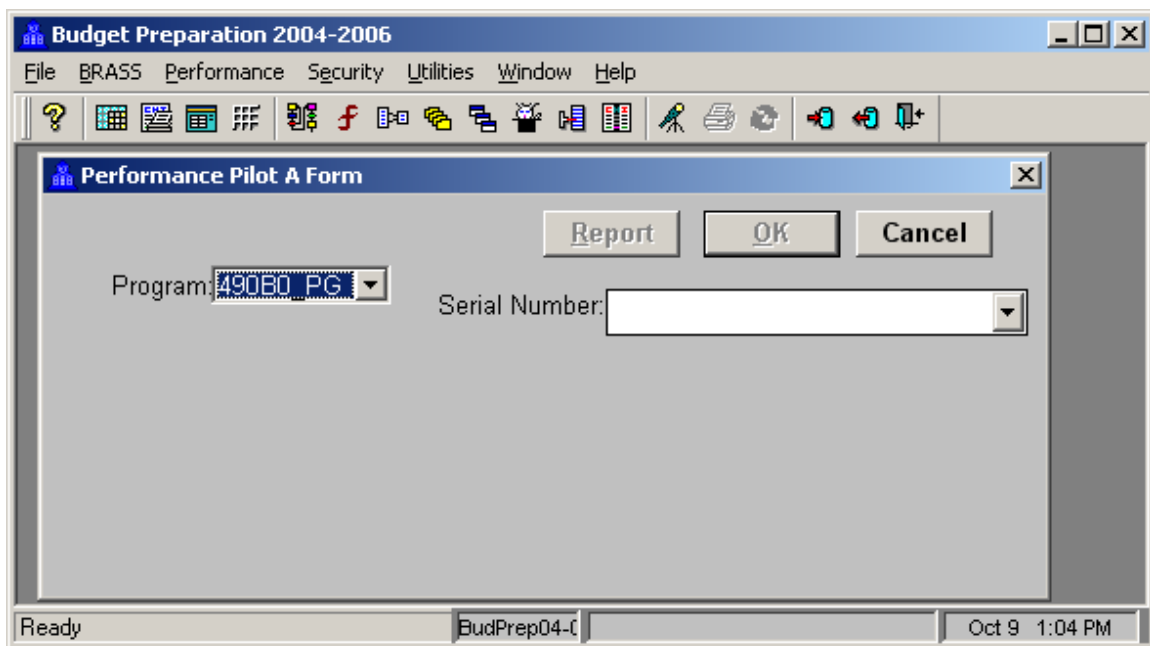
Creating Performance Budget forms

You will complete one Performance Budget Pilot A Form and one Performance Budget Pilot B Form. The B Form is necessary for any Additional Budget Request, excluding the Defined Calculations request, that may affect performance target figures for FY 2004-05 and 2005-06.

The Performance Budget Pilot A Form is created the same way as all BRASS forms. Select BRASS from the main menu then Budget Forms.

Each pilot program will complete one "Performance Pilot A Form" for the Baseline form that will include all Objectives, Performance Indicators, and their values for each fiscal year. If necessary, also create one "Performance Pilot B Form", within which you may enter performance target values that are associated with multiple Additional Budget Request (ABR) items.

Performance Pilot A Form
From the Budget Forms window select Performance Pilot A Form. The following window will appear.

The Performance A Form is created at the Program 6C level. (They are designated with the _PG code.)

After selecting the Program code, populate the form description, select a stage and click the OK button. The Performance Pilot A Form will appear.

Important Note: For the 2004-06 budget request process, each pilot program will enter both the Budgeted and Actual values for fiscal years 2001-02 and 2002-03. The fiscal year 2003-04 information can represent revised targets, and do not have to be the same as what was projected for fiscal year 2003-04 two years ago.

Complete the Program, Performance (Indicator) and Object information.

The Program field is where you select each Objective from the dropdown menu. All Objectives are in this one form, available for selection.

The Performance Field will be populated with the correct Indicator for the corresponding Objective. All Performance Indicators are in this one form, available for selection.

The Object field will be populated from the dropdown indicating the data to be entered will be a Percent or a Whole Number.

For "percent" values, enter whole numbers (example: enter 75 for 75%).

Once the form has been complete click the Save button.

Creating a Performance Budget B Form.

One Performance Budget Pilot B Form is created by selecting the 6C Program code (ex: 490B0_PG) and by selecting the 5C ABR code (ex: 490_BILL). **All** ABR codes, Objective codes, and Performance Indicator codes are available inside this one form for selection.

After selecting the Program code and ABR code, populate the form description, select a stage and click the OK button. (Example below):

The Performance Pilot B Form will appear. Complete the Program, ABR, Performance (Indicator) and Object information.

The Program field will always be populated with all Objective codes, which are selected from the dropdown.

The ABR field will be populated with all possible ABR codes, which are selected from the dropdown.

The Performance Field will be populated with all of the Indicators, which are selected from the dropdown.

The Object field will be populated from the dropdown indicating the data to be entered will be a Percent or a Whole Number.

For "percent" values, enter whole numbers (example: enter 1 for 1%).

(Example Below):

Printing the Performance A and C Reports

Select BRASS from the main menu, then reports. From the Report Selection window select the desired Performance Pilot A or C Report and click OK.
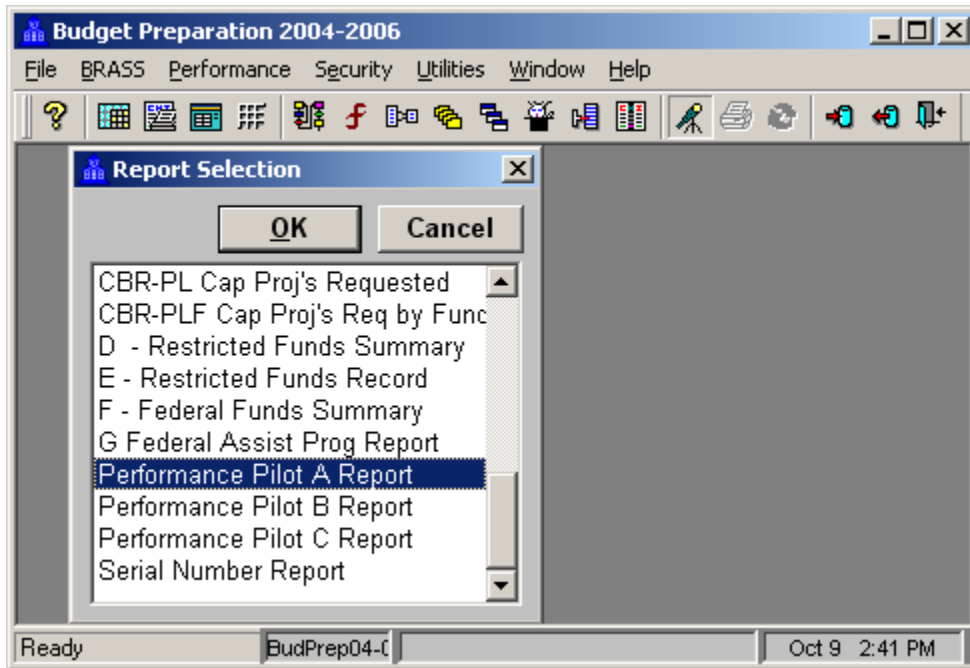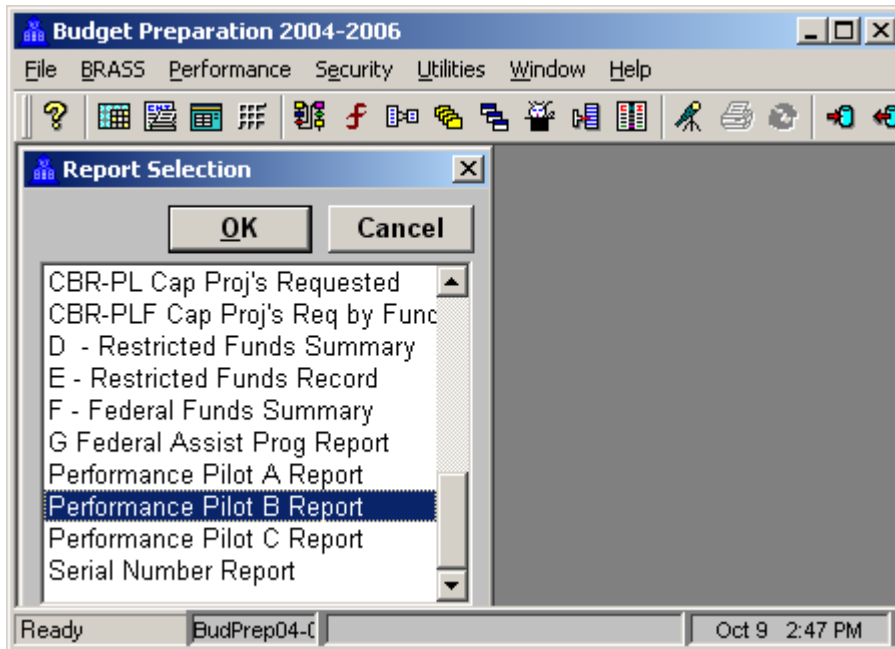

The report is executed at the 6C (_PG) level.
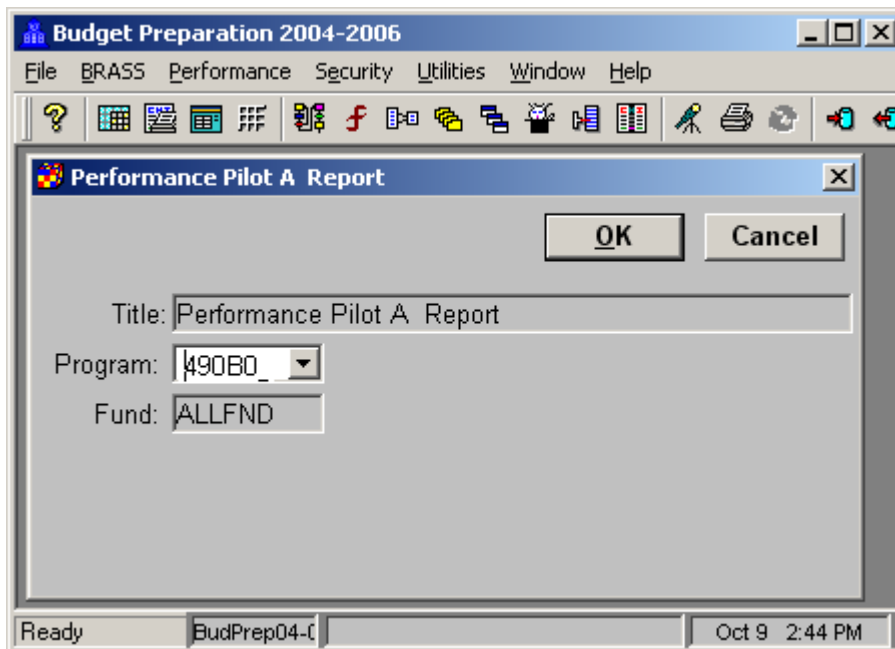
Printing the Performance B Report

Select BRASS from the main menu, then reports. From the Report Selection window select the desired Performance Pilot B Report and click OK.

The report is executed at the 6C (_PG) and the 7N ABR (X01) level.